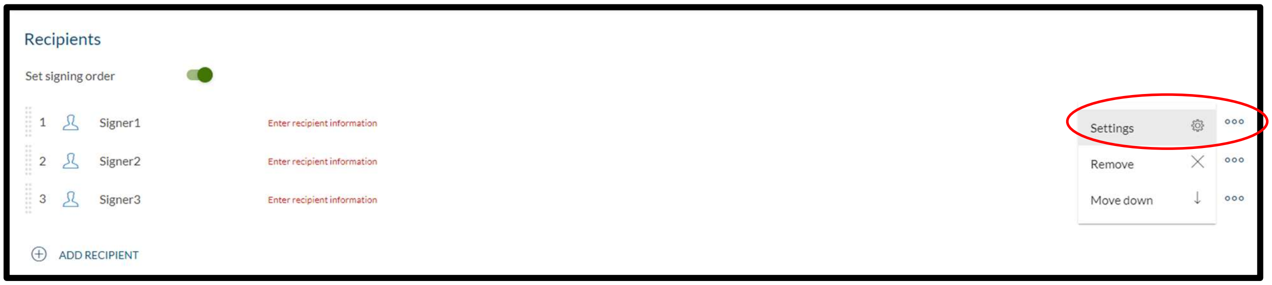
State of Michigan

Records Management Services

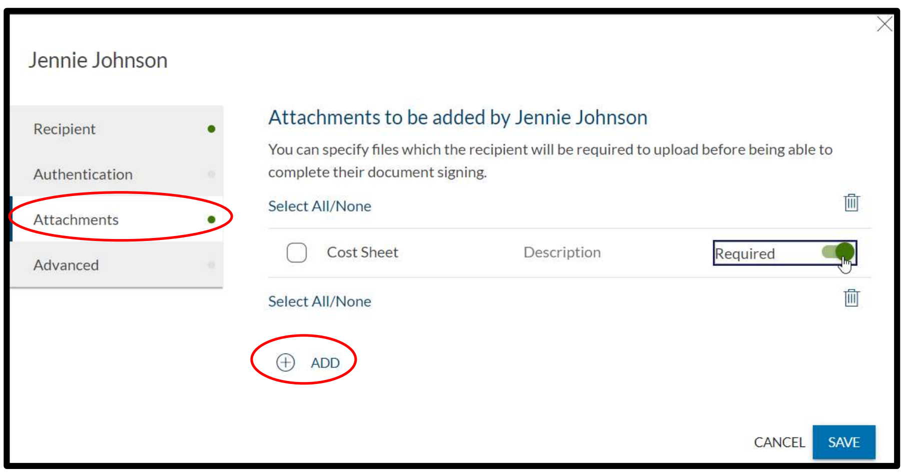
eSignature Solution
Tip Sheet: Signers Adding Documents to Transactions

Some transactions require a recipient to submit one or more documents, such as an image of their driver's license, with the document(s) to be signed. Before the transaction is completed, the sender would need to verify the correct document was uploaded to the transaction.

The sender will need to identify the recipient(s) who are required to add document(s) to the transaction. The sender will go to the right-side of the recipient's line and click on the 3 dots, and then select settings.



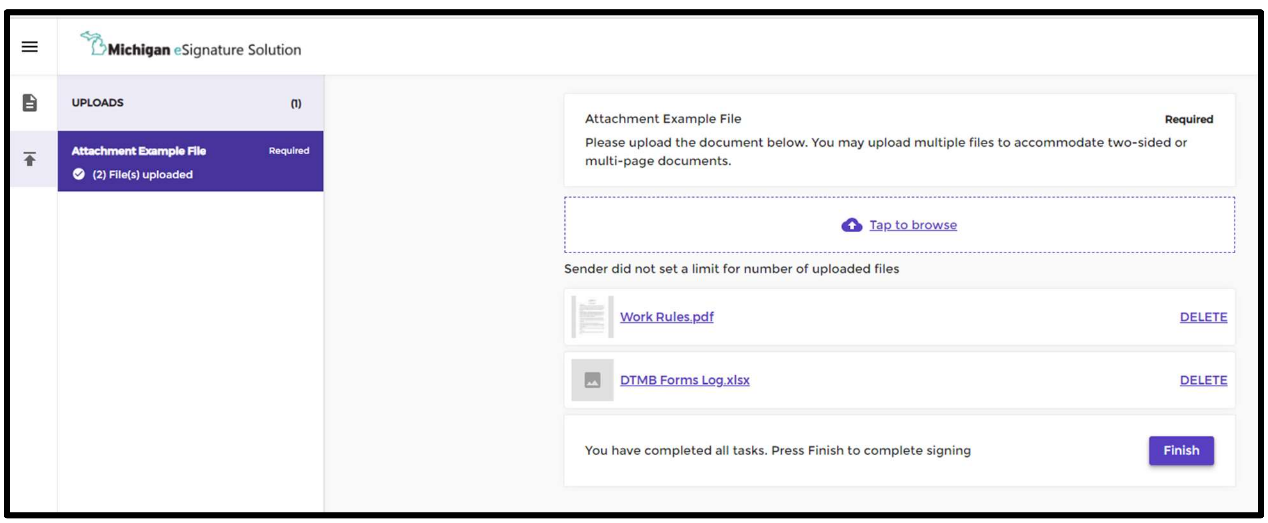
Then, go to the **Attachments Tab** to specify which document(s) this recipient is required to upload. Click the ADD button to specify which document(s) are requested. Provide the name of the document, a description (optional), and identify if it is required.



The Transaction Settings will be automatically updated to turn on the Review before completion setting.

Next, the recipient will receive an email inviting them to sign the document(s) in the transaction. After they sign the document(s) and click the CONFIRM button, they will be notified that they still have pending uploads. They will need to click the GO TO UPLOADS button.

The recipient will receive information about the document(s) they need to upload. They need to click the Tap to browse button to upload the document(s). Document types that can be uploaded include: BMP, DOC, DOCX, GIF, JPEG, JPG, ODT, PDF, PNG, RTF, TIF, TIFF, TXT, XLS, and XLSX.



Once the recipient adds the document(s) they can click the Finish button and then the Continue button to complete their role in the transaction.

The sender will be notified when the document(s) are attached to the transaction so they can be reviewed, as well as when all of the transaction document(s) are signed. The sender needs to review the uploaded document(s) to complete the transaction by going to the portal dashboard and viewing the transaction. *Note:* an information icon will be displayed next to any transactions that contain documents to be reviewed.

The sender should click on the download button to view the uploaded document(s).

- If there is a problem with the document(s), the sender should click on the Comment button to explain to the signer what is wrong so it can be corrected. Then, toggle on the Reject button, and click Save & Notify. The signer will receive an email notifying them that the document(s) were rejected and why, and the signer will be able to upload new document(s).
- If the document looks good, the sender should click the Complete button in the toolbar that is located in the upper right-hand corner of the screen.